

Access Success



Customer's BEST Communication Style: *Bold Expressive Supportive Technical*

Non-Professional Topics of Interest (*hobbies, sports, family, etc.*)

1.	2.
3.	4.
5.	6.

Resources Available to Gain Access & Provide Value to this Physician:

Obstacles to Gaining Access	Action Steps to Overcome Obstacles

Business Need/Goal	Resources/Information/ Educational Materials

Points of Interest Business/Practice and Market Issues	Ways to Build Partnerships

Customer Needs	Innovative Access Approaches	Team Involved
Confidential—Disclosure to Unauthorized Persons forbidden by Order of the United States District Court of Southern District of Illinois		

Product Name: _____

Recommendations for overcoming product access:

Access Action Plan

Goal: To develop access strategies and apply methods to utilize available resources to gain access to _____ by ____/____/____.

Focus of Access Action Plan:

- ☐ Making a positive impression on your customer.
- ☐ Engaging and encouraging customer involvement.
- ☐ Providing value to your customers.
- ☐ Identifying and providing recommendations to overcome product access constraints.

Action Step	Resources Needed	Target Date
		/ /
		/ /
		/ /
		/ /
		/ /
		/ /

Are your action steps in alignment with:

- ☐ What this customer needs from you?
- ☐ What is important to this customer?
- ☐ Your customer's communication style?
- ☐ Available resources that apply to your customer's needs?
- ☐ Providing value to your customer?

If not, adjust your action steps accordingly.

Access Profile

Physician/Customer Name: _____

Physician Type/Specialty: _____

Focus of Access Profile:

- ☐ Making a positive impression on your customer.
- ☐ Engaging and encouraging customer involvement in the sales discussion by focusing on relevant professional issues and personal interests.
- ☐ Providing value to your customer.
- ☐ Identifying and providing recommendations to overcome product access constraints.

What does this physician/customer need from you?

What is important to this physician/customer?

I will take the following action step(s) to make a positive impression with this customer:

I think this customer's communication style is _____.

Access Profile

Based on the information learned from the review of the BEST Communication Styles and listening to "The Mindset of Physicians" audiocassette program, I will communicate differently with this physician by doing the following:

-
-
-

To provide value, I am planning to:

-
-
-

To move the conversation from a non-professional topic of interest to a professional topic, I can use the following transition with my customer

What additional steps, if any, will I need to take to gain physical access to this office/physician/customer? What action steps do I need to include on my Access Action Plan to gain physical access to this customer?

Access Analysis

Physician/Customer Name: _____

Corresponding "Top Five List" Number: _____

Type of Access Challenge: *(circle/highlight all applicable types of access)*

Physical

Mental

Product

What Is The Problem?	Response(s)/Notes:
<ul style="list-style-type: none"> ■ Why do I think there is an access problem? ■ Do I have difficulty communicating with the physician/customer? ■ Is the physician/customer difficult to physically or mentally access? Why? ■ What is the difference between what I am doing and what I need to be doing? ■ Are my counterparts having success at gaining access? What are my counterparts doing that has made them successful at gaining access? ■ Is this a "refusal" (sees no representatives) physician? Is gaining access to this physician closed to <u>all</u> representatives? Why might this be the case? 	

Access Analysis

Is It Important?	Response(s)/Notes:
<ul style="list-style-type: none"> ■ What is the cost/ROI of gaining access? TIP: It may help to think about your most important product responsibilities in calculating the ROI. ■ How many prescriptions are written for me with access? For my competitors? What is my potential in number of new prescriptions if I gain access? ■ What would happen if I maintain the current access that I have? ■ What are the worthwhile results of gaining access with this physician? 	

Is It A Skill I Need To Develop?	Response(s)/Notes:
<ul style="list-style-type: none"> ■ How would I change my approach in gaining access to this physician or customer if my job depended on it? ■ What skills am I using currently to gain access to this physician/customer? What skills do I need to develop to gain access? ■ Do competitors gain access to this physician/customer? If so, what do they do that's different from what I am doing? ■ What are the obstacles to gaining access to this physician/customer? ■ What prevents me personally from gaining access to this physician/customer? ■ Am I trying to gain access at the wrong time, on the wrong day, using the wrong method, etc.? 	

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**SELLING SKILLS
MILESTONE 1**

Ver. 4/00

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Learning Objectives



- Describe the three types of access.
- Describe the three main components of mental access.
- Make a positive impression on your customers by demonstrating:
 - Respect for his/her time,
 - Respect for his/her medical expertise,
 - Respect for his/her professional/personal beliefs,
 - Respect for his/her office staff,
 - Respect for his/her business needs and goals,
 - Product and disease knowledge as it relates to promoted product(s) and disease state(s),
 - Knowledge of therapeutic markets relating to product(s) responsibility
 - Objectivity in product sales discussions,
 - Positive personality and character traits, and
 - Logical, concise and direct communication approaches.
- Engage and encourage customer involvement in a sales discussion by focusing on relevant professional issues and personal interests by:
 - Gathering and occasionally applying, as appropriate, information on customer communication styles and cross-cultural characteristics and beliefs,
 - Gathering and occasionally applying, as appropriate, information on non-professional topics of interest (i.e.: hobbies, sports, and common interests), and
 - Providing key information and topics of interest in short (under three minute) discussions.
- Provide value to your customer by:
 - Identifying and occasionally offering information, resources and educational materials that the physician and staff find most interesting and/or helpful to their practice and aligned to their business needs and goals,
 - Identifying points of interest to the customer based on business/practice and market issues to initiate and maintain a partnership, and
 - Working with clustermates and the extended sales team (e.g. Business Manager, Specialty Representatives, and Hospital Representatives) to strategize and implement innovative access approaches tailored to customer needs.
- Identify and provide recommendations to overcome product access constraints.





Module Requirements

To successfully meet course requirements, complete the following required sections in the program: Then, submit your Access Action Plans to your Business Manager for review so s/he can "sign-off" for credit approval. Report action plan progress to your manager on your Weekly Activity Report.

Toolkit Contents & Materials

- Access Success Workbook
- "The Mindset of Physicians" Audiotape program
- Access Charts (5)
 - Access Analysis Worksheets (5)
 - Access Profiles (5)
 - Access Action Plans (5)



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Self-Study Instructions

- Read the Access Success Workbook.
- Listen to the audiotape: "The Mindset of Physicians."
- Complete all worksheets. Worksheets are listed in the Table of Contents section of this workbook. The worksheets will help you break down gaining access into manageable steps. The information that you complete on each worksheet should help you complete Access Charts and Access Action Plans.
- Record steps on applicable Access Charts or its contents - Access Analysis, Access Profiles or Access Action Plans - whenever you see this icon.
- Complete an Access Chart, Access Analysis, Access Profile and Access Action Plan for each of your five (5) identified physicians.
- Use the Access Chart/Analysis/Profile/Action Plan process for other physicians not identified in this course if this exercise will be beneficial to you in achieving your gaining access goals.
- Initiate conversations with your clustermates/counterparts to learn what they have done to gain access to your customers. Incorporate other representatives' success and lessons learned in your analysis and planning processes.
- Refer to your Access Action Plans prior to pre-call planning, and determine which action steps you will apply during a visit to the physicians whom you have identified in this course.
- Submit all five completed Access Action Plans to your Business Manager.





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Introduction

access (ăk'sēs') *n.* 1. A means of approaching; passage. 2. The right to enter or use
<has access to official documents>

In Webster's dictionary, access is defined simply. How to gain access to a customer can be more challenging to define. As a representative, your ability to gain access and provide value to your customers is critical in today's competitive environment. The value you bring to your customer will distinguish you from your competitors.

Gaining access to your customers while providing value to them can get complicated. The first step in gaining access is to identify the benefit for you and your customer. Increasing your awareness comes first, followed by building your access skills.

Access can be broken down into three key areas:

■ Physical Access

The ability to physically get in front of the physician. This often depends on the gatekeepers' and office policies regarding appointments and time frames during which representatives can visit the office.

■ Mental Access

The ability to mentally engage the physician in a product discussion. This often depends on the physician's willingness to listen, his/her preferred forum for discussions, his/her perceived value of the discussion and the availability of resources that meet the physician's needs.

■ Product Access

The ability and willingness for a physician to overcome formulary or physician group controls to prescribe a product.

All three types of access must work together for effective physician visits. Your challenge is to ensure that you are considering each type of access (e.g. physical, mental and product) when managing your business.





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In 1999, Merck had retained Health Strategies Group, Inc. to conduct a market research analysis to determine what physicians value most in their interactions with pharmaceutical representatives. Focus groups were conducted to guide the content of the research. Then, one-on-one interviews and individual surveys were conducted with 53 physicians in six cities. Mental and physical access topics were covered in this research. Health Strategies Group, Inc. summarized the results in a report called, "Access to High Prescribers – The World of Doorknob Details." Highlights from this research and the resulting copyrighted report are noted on the following pages.

Of the 1,200 representative visits tracked by Health Strategies Group, Inc., 43% of representatives were unsuccessful in gaining access to the physician. Fifteen percent (15%) of the representatives were either turned away by the receptionist or asked to leave samples at the front desk (28%). An estimated 15% of representatives left the office without even checking in at the front desk.

In the remaining 57% of visits, representatives met the physician either at the sample closet (37%) or during a sit down discussion (20%). During these visits where access to the physician occurred, the amount of time spent with the physician discussing products was less than two minutes in 87% of the calls.

"Access to High Prescribers – The World of Doorknob Details" went on to summarize physician preferences for physical and mental access. Regarding physical access, they concluded that:

- 53% of physicians prefer reps to make an appointment over lunch.
- 32% prefer reps make an appointment for a particular time.
- 28% specifically stated that reps are welcome to drop off samples any time.
- 34% said that reps can stop by their office without an appointment and speak with the physician between patient visits.

Other research findings about physical and mental access were:

- PCPs prefer lunch appointments, while Specialists see more reps in their offices.
- PCPs like dinner meetings with speakers, while Specialists are looking for conferences offering CME credit.
- Physicians claim they spend five minutes with each rep. Most of this time occurs over lunch for 20-30 minutes. The least amount of time is spent while the physician is signing for samples; approximately two to five minutes.
- Physicians are willing to extend time if the representative has anything NEW to say, or if they want to discuss other topics of interest. Keep this last thought in mind, because it is important in gaining mental access, as well.



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This is what physicians had to say about mental access:

- The minimum requirements for a product presentation must include product efficacy, cost and side effects. This information must be presented in a concise manner, or the physician may choose to tune it out.
- Physicians don't want to hear the same detail over and over.
- New information will pique their interest.
- Physicians will believe you if you provide a balanced presentation supported by scientific data. Conversely, they will be doubtful of you if you omit discussion of side effects or adverse reactions.
- Specialists are most interested in seeing reprints and research.

Regarding value-added services, this is what physicians think:

- 40% of these physicians say that the services offered may impact their willingness to see the representative. Services include samples, product information, patient education materials and dinner meetings.
- Specialists want patient education and reprint materials more, and the PCPs want dinner meetings.

One aspect of mental access is your ability to make a positive impression on your customer. When physicians were asked to list traits of their favorite representatives, a 'good personality' was seen as the most often mentioned trait of a favorite representative. A representative with a good personality is one who 65% of specialists and 35% of PCPs would see more often.

Physicians defined a 'good personality' as being friendly, nice, personable, open to questions and discussions, easily accessible, using a low-pressure sales style and nice to their staff. Other characteristics of a favorite representative were demonstrating strong product knowledge, honesty, being unbiased in delivering product information, presenting information concisely, not being negative toward the competition, bringing samples, following up and being professional and respectful of the physician's time.

The research also presented what physicians don't like in their representatives. Of the physicians asked, 55% responded that they don't like representatives who are impolite, overly aggressive and pushy. This is the most often mentioned trait of the least favorite representative that physicians say persuaded them to see the representative less often than others.





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Physicians noted the following barriers to gaining physical and mental access:

- Asking for commitment to prescribing product – this is seen as overly aggressive
- Not being concise – insisting on doing the full detail
- Being disrespectful of the physician's medical expertise
- Presenting biased information (failing to offer fair balance)

So, what do you do with this research to improve your ability and skill to gain access? Throughout this course, you will break down the "gaining access" process into manageable steps to improve your access skills and make necessary adjustments. You will also work on customizing Access Charts for gaining access to each of your "Top Five" physicians/customers. Using Access Profiles, you will brainstorm everything that you need to know about your physicians that could impact your ability to gain access and provide your physicians with value.

You will be gathering information for Access Charts and Access Profiles throughout this course. Each "chart" is essentially a folder with general information recorded on the outside. The contents of each "chart" will be the Access Profiles that you create.

Whenever you see the folder icon, record the information specific to your top five customer directly on the chart or on the Access Profile inside the folder.



This course will focus primarily on developing strategies for gaining mental access to physicians, though there may be times when the office staff prevents physical access to the physician. When you are creating your Access Charts and Access Profiles, you will need to consider the additional steps needed to work with the office staff to gain access to your identified physician.

Often you can gain initial access to a physician. During your initial call, however, you may do things that will limit your continued access to this physician. Therefore, it is very important on an initial call to give the physician what they want and need so that you will continue to gain ongoing access to that physician. Your plans should focus, not only on what you need to do to gain access initially, but also on what you need to do in that initial visit to ensure ongoing access to that physician. After all, very few – if any – physicians change their prescribing habits or try a new product on the first call. It usually takes many calls to accomplish this change in behavior, so ongoing access is the name of the game.



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The time investment you are making now to consider and improve upon all of the factors impacting your ability to gain access will pay off for you when you are able to gain access to these individuals.

Before you start to create plans to gain access to specific customers, you need to consider the importance of access to your customers and consider the patients that your customers treat.





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Reflection: Why Is Gaining Access Important?

Before you roll up your sleeves and start developing your Access Charts, take some time to reflect on access. Be "thoughtful" in your responses.

- Why is gaining access to your customer important to your **customer(s)**? (Think about this from their perspective: What's in it for them? What do they want and need? What do they value?)

- Why is gaining access important to **you**? How is your answer to this question and the question above similar or different?

- Why is gaining access important to the **patients** whom your customers treat? If your family member was a patient of this practice, and you needed to gain access to persuade the physician to prescribe the Merck product because you knew it was the best choice for your family member, what would you do in order to gain access to this physician?

Identifying themes from your responses may help you develop and focus your skill development in these specific areas. What common themes, if any, emerge from your responses to these questions?



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Identifying Your Top Five Gaining Access Customers

Now that you have identified, generally, why gaining access is important, you can start thinking about how gaining access can benefit specific customers (and their patients). Think of specific customers to whom gaining access has really been a challenge. This will help you to focus your responses to many of the questions and assignments in this course. Customers can include the office manager, office receptionist and nurses since they all have impact on whether you gain access to the physician.



Using territory management, business analysis and sales information tools (i.e. *Insight*, *Merlin*, reports, and *FS-Net*), select the top five offices/ physicians for your most important product for whom access will reap the greatest ROI for you, your clustermates and Merck.

NOTE: For continuity (and to avoid re-writing the same information), when the first column is numbered 1-5, the number should correspond to the physician or customer name you identify in your Top Five list.

Physician/Customer Name:

1. _____
2. _____
3. _____
4. _____
5. _____





Access Analyses – Identifying Common Themes

Now that you've identified your Top Five Customers, you will begin creating an Access Chart for each customer.



Write the Physician Name on the outside of the chart.

Remove the Access Analysis from the inside of each folder (chart).

Complete the information at the top of the first page. This includes highlighting or circling the types of access that apply to this customer.

Write your responses to each of the questions listed on the Access Analysis document.





Access Analyses – Identifying Common Themes

When you have completed the Access Analysis for each of the five Access Charts, look for common themes as opportunities for focusing your efforts in this course. Write the common themes in the space provided.



What is the problem?

- Why do I think there is an access problem?

- What is the difference between what I am doing now and what I need to be doing?

- What are my counterparts doing that has made them successful in gaining access? What tips can I ask them to share with me? What other information can I learn from them?

- Is this a "refusal" (one who sees no representatives) physician? Is gaining access to this physician closed to all representatives? Why might this be the case?

Is it important?

- What is the cost/ROI of gaining access? TIP: It may help to think about your most important product responsibilities to calculate the ROI.





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- How many prescriptions are written for Merck with access? For my competitors? What is my potential number of new prescriptions if I do gain access?

- What would happen if I maintain the current access that I have?

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Is it a skill I need to develop?

- Do competitors gain access to this physician/customer? If so, what do they do that's different from what I am doing?

- What are the obstacles to gaining access to this physician/customer?

- What limits me personally from gaining access to this physician/customer?

- Am I trying to gain access at the wrong time, on the wrong day or am I using the wrong method?





Resources To Gain Physical Access

One of the themes that may have emerged from your analyses is that there might be circumstances when your counterparts have been successful at gaining physical access, while you have been unsuccessful at gaining access. You have a number of resources (human and non-human) available to you as a representative to help you to gain physical access to your customers. These same resources can be utilized to gain mental access to your customers.

The human resources that exist at Merck have a wealth of knowledge and experience that you may want to tap into to gain access. Some examples of human resources available to help you gain access include your Business Manager, Region Medical Directors, NAE, HSAs, Specialty Representatives, clustermates and your hospital counterparts.* There are also many non-human resources, e.g., HEL programs, scientific information and resources available to you that may help you to gain access.

Use the space on the following page to identify the human and non-human resources available that can help you to gain access. Also identify how you could utilize these resources and the measurements that you could use to determine a return on investment of your time and the resources used to gain access and provide value. An example of what this might look like can be found in the chart below.

Resources Available	How Could Resources Be Utilized?	Investment of Time and Resources to Gain Access & Provide Value
HSA (Health Science Associate) and HEL program	<p>HSA could arrange an appointment with a key national advocate to discuss information unavailable to me as a representative.</p> <p>HSA could identify key programs that would interest the physician. As a representative, I could accompany the HSA to the appointment as an observer and begin to build rapport with the physician.</p> <p>As a representative, I could meet the physician and arrange for his/her to speak at an upcoming HEL program.</p>	<ul style="list-style-type: none"> ■ Telephone calls to HSA to coordinate appointments (15 minutes) ■ Office visit to physician (up to 2 hours, including travel) ■ Study information recommended by the HSA (2-3 hours) ■ Telephone calls to coordinate HEL program (1 hour, total) <p>Total Time Investment: <8 Hours</p>

*Upon completion of this course, please share your findings with all the people who helped you develop your list of human resources. They may want to include your action steps in their objectives, as well.





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Resources To Gain Physical Access (continued)



Resources Available	How Could Resources Be Utilized?	Investment of Time and Resources to Gain Access & Provide Value
		■
		■
		■
		■
		■



Transfer the information that you identify here to any applicable Access Charts.





Potential Physical Access Obstacles

Now that you have identified the resources you could use to gain access and you have recorded that information on applicable Access Charts, another theme that may have emerged from your Access Analyses is the common obstacles to gaining access. Once you recognize the value of gaining access for your customer and for your success, you need to determine what (if any) human and non-human variables and obstacles interfere with your ability to gain access. You also need to determine what actions you can take to overcome these obstacles. Choose one of the assignments below to identify and overcome obstacles.

Option #1: One way to obtain feedback from your customers/physicians is to ask them to participate in a survey to uncover the "pain relief" needs of some of your most important customers. Ask the doctors/nurses to think of the value that some of the best representatives bring to the office and ask the doctor/nurse to describe what makes these representatives valuable. This may help you learn more about your physicians/customers than you might expect to learn by assuming or brainstorming solutions to obstacles. The value you can bring to their practice might be able to offer some "relief from pain" of the obstacles they have been facing in their business.

Option #1:

If you chose to survey your physicians and customers, what specific action steps can you take to provide value to your physicians and customers? (Remember that providing value is a component of gaining mental access to your customers). Use the space below to write your action steps.





Potential Physical Access Obstacles (continued)

Option #2: Refer to the examples below of some possible obstacles to gaining access or providing value to your physicians and some ways to overcome these obstacles.

Description of Gaining Access or Providing Value Obstacle	Specific, Measurable Actions to Overcome This Obstacle
There are too many representatives that call on the same customers.	<ul style="list-style-type: none">Working with your clustermates, develop a plan for calling on this customer to streamline and unite your presence in front of this physician.Use <i>Insight</i> Hot Notes to communicate updates to your clustermates about this customer.Share with your clustermates best practices and lessons learned about gaining access with this customer.Visit the physician in another location (e.g. a second office, hospital, or nursing home).
Customer perceives that representatives do not bring any value to the medicine he or she practices.	<ul style="list-style-type: none">Research as much information as possible about the physician's practice, including how managed care impacts their business.Work with HSAs and specialty reps to identify appropriate HEL programs, advocates, and other education programs that might benefit the physician.Arrange for a preceptorship/tutorial with this physician and make observations about how you can add value to his/her practice (e.g. organizing the sample closet).

Some other obstacles to gaining access or providing value may include:

1. An unknown personal problem is affecting access with the customer.
2. Ancillary personnel are totally eliminating your opportunity to gain access.
3. One partner in practice has established the "no access" rules and everyone else follows them.
4. You've developed a habit of dropping off samples and this is all the physician sees you doing.
5. You begin your sales discussion by asking the physician, "How is ZOCOR/FOSAMAX/VIOXX/etc., going? If so, you may be inadvertently be encouraging the physician to say, "Great! Leave me some samples" and end your call.

What are some of your obstacles to gaining access or providing value? How can you overcome these obstacles? Use the space provided to write your responses.



Potential Physical Access Obstacles (continued)

Description of Gaining Access or Providing Value Obstacle	Specific, Measurable Actions to Overcome This Obstacle





Record obstacles and action steps to overcome these access obstacles on the applicable Access Charts.

Gaining Mental Access

You have completed some general analyses of your top five physicians to whom you want to gain access. Your analyses included identifying some general themes about why gaining access is important.

The primary focus of this course is on gaining mental access to your customers. The three main components to the mental access that will be covered (or uncovered) in detail in this course are:

1. Making a positive impression on your customers.
2. Engaging and encouraging customer involvement in the sales discussion by focusing on relevant professional issues and personal interests.
3. Providing value to your customers.

The first objective in this "mental access" list is making a positive impression by showing respect for the physician in a variety of ways. An abbreviated Webster's dictionary definition of impression and respect follow.

impression (im-'presh-□n) *n.* 1. a communicating of a mold, trait or character by an external force or influence. 2. a characteristic, trait or feature resulting from some influence.

respect (ri-'spekt) *n.* 1. an act of giving particular attention : CONSIDERATION. 2. high or special regard: ESTEEM. *vt a.* to consider worthy of high regard ESTEEM; *b.* to refrain from interfering with.

You can make a positive impression by demonstrating respect for your customer in terms of his/her:

- | | |
|---------------------|--------------------------------|
| ▪ Time | ▪ Personal Beliefs |
| ▪ Medical Expertise | ▪ Professional Needs and Wants |
| ▪ Office Staff | ▪ Business Needs and Goals |



ACCESS SUCCESS



Mental Access #1: Communication and Positive Impressions

Use the space below to write some ways that you have demonstrated or could demonstrate respect for your customer's:



	Ways I Have Demonstrated Respect	Ways I Could Demonstrate Respect
Time:		
Medical Expertise:		
Personal Beliefs:		
Professional Needs and Wants:		
Office Staff:		
Business Needs and Goals:		





Mental Access #1: Communication and Positive Impressions (continued)

In addition to showing respect for the physician, you can make a positive impression on the customer by:

- demonstrating your product and disease knowledge as it relates to promoted product(s) and disease state(s);
- demonstrating your knowledge of therapeutic markets relating to product(s) responsibility;
- presenting information objectively in sales discussions;
- demonstrating positive personality and character traits; and
- communicating logically, concisely and directly.

Use the space below to write how you have demonstrated and/or how you might demonstrate the competencies listed.

	Ways I Have Demonstrated	How I Might Demonstrate
Product and disease knowledge as it relates to promoted product(s) and disease state(s)		
Knowledge of therapeutic markets relating to product(s) responsibility:		
Ability to present information objectively in sales discussions:		
Your positive personality and character traits:		



**Mental Access #1: Communication & Positive Impressions
(continued)**

Your ability to communicate logically, concisely and directly can be impacted by the three "Vs" of communication – your verbal, vocal and visual messages and the verbal, vocal and visual messages that you receive from your customer.

The following components are important in everyday face-to-face communication.

Verbal (7%) <i>What someone says when listening. . .</i>	Vocal (38%) <i>How they say something when listening. . .</i>	Visual (55%) <i>What they're doing when listening. . .</i>
<ul style="list-style-type: none">▪ Hmmm, Yes, Okay, I see▪ Acknowledge▪ Ask questions▪ Summarize▪ Stay open to ideas▪ Short periods of silence	<ul style="list-style-type: none">▪ Sound interested▪ Mimic or match vocal behavior of speaker▪ Use voice inflection and energy▪ Use empathetic voice	<ul style="list-style-type: none">▪ Nod head▪ Eye contact▪ Smile (if appropriate)▪ Don't interrupt▪ Take notes▪ Openness in gestures

What should you do to ensure that you communicate logically, concisely and directly with your physician customers?

What should you do to ensure that your verbal, vocal and visual communication with your customers is effective?





ACCESS SUCCESS

Mental Access #1: Positive Impressions Action Steps

You have been focusing on the first component: gaining mental access, which involves making a positive impression on your customer. For each of your "Top Five" physicians/customers, write at least one action step that you will take to gain mental access by making a positive impression on that particular customer.



Record the action step(s) that you will take to make a positive impression with each customer on the applicable Access Profile found in the Access Chart





Mental Access #2: Communication Styles

The second objective in the "mental access" list is engaging and encouraging customer involvement in your sales discussion by focusing on relevant professional issues and personal interests. You can demonstrate that you are engaging and encouraging customer involvement by:

- Gathering and applying, as appropriate, information on customer communication styles and cross-cultural characteristics and beliefs.
- Gathering and applying, as appropriate, information on non-professional topics of interest (i.e. hobbies, sports, and areas of common interests).
- Providing key information and topics of professional interest in short (under three minute) discussions.

To help you learn more about the first bullet point—customer communication style—read the following pages about characteristics of the BEST communication styles.





Mental Access #2: Communication Styles

The BOLD Style

Physician qualities:

Getting results, getting the job done, achieving goals, taking charge, being in control

Physicians appreciate representatives who:

Get right to the point; keep commitments; use time efficiently; get results consistently; are organized, direct, and decisive; know what they are talking about and can answer questions; can give a presentation in 60-90 seconds on just what the doctor needs or wants; don't point to details in sales aids, but lets the doctor have control of the sales tools and reference information

Physician pet peeves:

Disorganization and inefficiency; last minute scrambles; commitments that aren't kept; issues that fall through the cracks; wasted time; second guessing after a decision is made; disrespect for their position in the chain of command

Physician behaviors:

- Will challenge your knowledge constantly.
- If you indicate that you know something and present it to them, they say to themselves, "Well, let's just see how much you do know. Does s/he know more than what's in the sales aids or the abstract of the paper quoted?"

How to connect to these physicians:

- Bolds require the three B's from you: **Be Bright** (know your stuff), **Be Brief** (get to the point since time is of the essence) and **Be gone**. If you can give them what they want, you will get what you want. If they perceive you as a valuable resource, you will get ongoing access.





Mental Access #2: Communication Styles

The EXPRESSIVE Style

Physician qualities:

Novelty, fun, excitement, challenges

Physicians appreciate representatives who:

Share their excitement and optimism; rally to the cause and rise to the challenge; support their ideas; take care of the details (so they don't have to "sweat the small stuff"); know how to have fun with their work, involve them in social outings; socialize with them outside the office

Physician pet peeves:

Perfectionism; nay-sayers; a preoccupation with minor details; people who don't catch on quickly or who slow them down; people who don't take their word for things

Physician behaviors:

- Expressive doctors are communicative when talking about things other than medicine, but will more likely revert to the technical style when they discuss clinical medicine.

Note: Expressive physicians are usually not a problem for representatives as many representatives are Expressive themselves.

How to connect to these physicians:

- Start in the expressive mode for your initial meeting; when you get to the clinical part, get technical.
- Tell physician how using your product will help him/her achieve goals.





Mental Access #2: Communication Styles

The SUPPORTIVE Style

Physician qualities:

Relationships, consideration of others, loyal team players, peacemakers, perceptive, intuitive, patient

Physicians appreciate representatives who:

Share their consideration and good manners; ask about feelings; provide encouragement; show appreciation; practice the Golden Rule; are patient, stable and reliable; are interested in the doctor's patients and express how they can help the doctor help their patients; work with doctor as a team to help patients; use a lot of patient benefit statements in their discussions; team with the doctor's staff to help disseminate patient education materials and educate patients

Physician pet peeves:

Insensitivity; brash directness; being taken for granted; pressure to use a product; criticism; impatience; being thought of as weak; people who take advantage of their good nature

Physician behaviors:

- May tell you that they are using your product when they're not.
- To avoid a disagreeable exchange with you, will do everything they can to talk around product when they know they have a problem.
- May patronize you.
- May say all products you have are good.
- Will not disagree very strongly or challenge you but will simply not use your product.

How to connect to these physicians:

- Ask them to help you out by telling you what is their objection or what further information they need to make a favorable determination to use your product.
- Communicate that you are really interested in helping them to help their patients.
- Indicate that you can give them all your support and resources to partner with them to improve patient/employee relations.





Mental Access #2: Communication Styles

The TECHNICAL Style

Physician qualities:

Accuracy, precision, quality work, zero mistakes or defects

Physicians appreciate people who:

Can attack a problem logically and unemotionally; want to see a job done right the first time; respect rules out of a sense of fair play and justice; present rational and logical opinions; have their facts together; point out mistakes or flaws before they find them; arrange their presentations in a logical scientific order; use the case presentation method; speak in the third person rather than the first person; use the term drug (therapy, therapeutic agent, medication) instead of product

Physician pet peeves:

Hype; uninformed optimism; inattention to detail; shoddy work; consequences or risks that weren't anticipated or forewarned; emotional testimonials and appeals; pressure to jump to premature conclusions or do a shoddy job

Physician behaviors:

- Very conservative and resistant to change.
- Will use the lack of data, skepticism of data, and the need for the drug to be in use for years to avoid change.
- Tend to be more particular and detailed in correlation to how specialized or sub-specialized they become.

How to connect to these physicians:

- Understand concepts and be able to explain them. Let them know that you know these things and you will gain their trust. They will want to know not only the details, but require that you know what you are saying. The technical will test you. For instance, if you refer to a *P* value, be sure you know what a *P* value means and whether or not it's statistically significant.
- Create a sense of urgency for them to change their clinical behavior such as, "Doctor _____ is using it and getting better outcomes."





Mental Access #2: Communication Styles

Pushing their Buttons

BOLD

What pushes their buttons:

- Wasting their time
- Not doing what you said you would do
- Not doing what they told you to do
- Jeopardizing their goals

How they'll react:

- Ask pointed, probing questions
- Act impatient or annoyed
- Tell you exactly what to do
- Talk down to you

EXPRESSIVE

What pushes their buttons:

- * Not sharing their excitement
- * Asking a lot of nit-picky questions
- * Implying that they might drop the ball
- * Pinning them down to specifics

How they'll react:

- * Get defensive
- * Argue with your logic
- * Give a dramatic or emotional argument
- * Tell you you're missing the point

TECHNICAL

What pushes their buttons:

- Dramatic, emotional arguments
- Drawing conclusions without facts
- Insisting that they leap before they look
- Not paying attention to details
- Personalizing an issue

How they'll react:

- Get flustered and confused
- Ask you to clarify facts
- Ask you to support your opinions
- Reject your conclusions

SUPPORTIVE

What pushes their buttons:

- ❖ Not taking time for social graces
- ❖ Insensitivity or obliviousness to feelings
- ❖ Implying they don't care or are letting you down
- ❖ Not taking the time to listen

How they'll react:

- ❖ Get quiet
- ❖ Say, "O.K.", but don't seem to mean it
- ❖ Stop doing special favors
- ❖ Withdrawal and be difficult to re-engage



**Mental Access #2: Communication Styles****Flexing**

Following your review of the BEST communication styles, determine which communication style each of your Top Five physicians most consistently uses. Write any clues, signs or characteristics in the row corresponding to the number that you assigned the physician on your original Top Five list.

Based on your preferred communication style, think about ways you can flex your style to gain access and meet your customer's needs. Write your proposed action steps in the appropriate column.

Physician Name: Clues, Signs, Characteristics of Physician's BEST Style	Ways To Flex My Style to Meet My Customer's Needs
1.	
2.	
3.	
4.	
5.	





Mental Access #2: Communication Styles

"The Mindset of Physicians" Audiotape

To complete the information you have about customer communication styles, listen to the "Mindset of Physicians" audiocassettes from your tool kit describing the mindset of physicians and their personality types.

Dr. Michael Kessler raises several key points in "The Mindset of Physicians" audiocassette. He suggests that you should remember these key points in dealing more effectively with doctors. Read the statements below and think about whether you agree or disagree with these statements as they pertain to the five physicians that you identified.

1. The more you understand how doctors think, act and communicate, the more successful you'll be.
2. In general, doctors are trained to act, communicate and think in the same way. Their training is so long and so intense that they rarely lose this mindset. It permeates most of their professional and social lives.
3. All doctors may exhibit at one time or another their not-so-nice personality characteristics to you. You shouldn't take it personally because they are all taught to be that way in their training and can be that way from time to time for no apparent reason.
4. Challenging others is what doctors do every day all their lives. It's the way they do business. When doctors challenge you, they are really asking for more information and are testing you to see what you know. If you know your stuff, you will be successful with doctors.
5. You need to separate yourself from your competitors in the doctors' eyes and be perceived as a professional.



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Mental Access #2

"The Mindset of Physicians" Audiotape



What other key points did you get from the audiotape program?

Based upon what you have learned from the review of the BEST communication styles, as well as "The Mindset of Physicians", what one action step will you take to communicate differently with each of your five physicians?



Record your action step on the applicable Access Profile found in the Access Chart.





Mental Access #2 Non-Professional Communication Topics

Another way to engage and encourage customer involvement in the sales discussion is to gather and apply, as appropriate, information on non-professional topics of interest (e.g., hobbies, sports, and areas of common interest).



For each of your top five physicians, seek out at least three non-professional topics of interest for that physician. Write these topics of interest on the front of each of the Access Charts.





Mental Access #2
Non-Professional Communication Topics Brainstorm

Select one non-professional topic from each of your five Access Charts. For each of the five topics selected:

- Brainstorm everything you can think of that is related to that topic from recent news items, personal anecdotes and other sources.
- Create questions that you can ask about the topic.
- From your brainstormed list of related words and topics, write one transition for each topic to show how you might shift from the non-professional topic to the professional topic.

Topic #1: _____

Questions I can ask about this topic:

Transition(s) I can make from non-professional topic to professional topic:





Mental Access #2
Non-Professional Communication Topics Brainstorm

Topic #2: _____

Questions I can ask about this topic:

Transition(s) I can make from non-professional topic to professional topic:

Topic #3: _____

Questions I can ask about this topic:

Transition(s) I can make from non-professional topic to professional topic:



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Mental Access #2 Non-Professional Communication Topics Brainstorm

Topic #4: _____

Questions I can ask about this topic:

Transition(s) I can make from non-professional topic to professional topic:

Topic #5: _____

Questions I can ask about this topic:

Transition(s) I can make from non-professional topic to professional topic:





Mental Access #2
Transitioning Between Topics



After you have created some possible transitions from non-professional topics to professional topics, practice incorporating at least one of these transitions into an upcoming selling discussion with a physician.

Physician: _____

Date of Call: _____

Topic(s) of Discussion: _____

Time Spent on the Call: _____

What worked well about transitioning between non-professional and professional topics?

What will you do differently the next time you transition from a non-professional topic to a professional topic?





Mental Access #2 Choosing Key Topics of Interest

The third aspect of mental access and engaging and encouraging customer involvement in discussions is to provide key information and topics of professional interest to your physicians in brief (under three minute) discussions.

For each of your top five physicians, identify the key information and professional topics of interest to them and the source of that information (e.g., journals, local newspaper articles, web sites and periodicals with Merck advertisements). Prioritize the order in which you will need to discuss this information if you have less than three minutes. Place a "1" next to the highest priority, "2" next to the second most important topic, etc. Consider how you might present the information in a way that the physician will want the conversation to continue beyond three minutes.

Physician	Key Information/Topics Source of Information/Topic Priority of Discussing
1.	
2.	





Mental Access #2
Choosing Key Topics of Interest (continued)

Physician	Key Information/Topics Source of Information/Topic Priority of Discussing
3.	
4.	
5.	





Mental Access #3 Providing Value to Your Customers

value (văl'yōō) *n.* 1. An amount regarded as a fair equivalent for something, esp. goods or services. 2. Material worth. 3. Worth in importance or usefulness to the possessor. 4. A standard or principle regarded as desirable or worthwhile.

The third aspect of gaining mental access is to provide value to your customers.

You can provide value to your customers by:

- Identifying and occasionally offering information, resources and educational materials the physician and staff find most interesting and/or helpful to their practice and identified business needs and goals,
- Identifying points of interest to the customer on business/practice and market issues to initiate and maintain a partnership, and
- Working with clustermates and the extended sales team (e.g., Business Manager, Specialty Representatives and Hospital Representatives) to strategize and implement innovative access approaches tailored to customer needs.

There are a number of ways to provide value to gain mental access to physicians. Some ways you can apply immediately and some will require that you partner with other people. Review the ideas described below and then brainstorm some additional ways that you can provide value to physicians to gain access.

- Find out what a physician's "hot topics" are, e.g., managed care issues. Initiate some rich discussions with him/her outside of the product discussion and do not discuss the product at that meeting. Use the information that you shared during a non-product discussion to help promote your product during your next meeting with that physician.
- Listen closely to what the physician is saying and turn it into an opportunity. For example, turn an interest in a society meeting into a grant.
- Play into the physician's mindset, especially talking a higher level of science. Increase your level of knowledge around disease so you can intelligently and confidently discuss disease and product.





Mental Access #3 Providing Value to Your Customers

- Stay "current" with medical issues. Read featured articles in the New England Journal of Medicine, keep abreast of network news medical stories and participate in physician-initiated discussions around the medical world's current events.
- Identify areas where physicians need your support (where you have the edge) such as tutoring them on the computer or the PowerPoint application.
- Attend society meetings and grand rounds. Being seen and not always heard can help earn credibility, especially when you are seen working outside of the standard 8-5 office hours.

What other ideas have you heard about or seen someone else apply to gain access and provide value? What are some ways you can apply the ideas listed above or other ideas not listed? Use the space below to jot some of your ideas or just go directly to your physician profiles to write your ideas for providing value to gain access.





Mental Access #3 Identifying Customer Business Needs and Goals

One of the ways that you can provide value to your customers is to identify and offer information, resources and educational materials that the physician and staff find most interesting and/or helpful for their practice and identified business needs and goals.

For your top five physicians, identify at least one business need and goal. Then, list the information, resources and educational materials the physician and staff from that practice would find most helpful and valuable.



Record at least one business need or goal on each of your Access Charts. Identify the resources, information and/or educational materials that the physician and staff would find most interesting and/or helpful for their practice and identified business needs and goals.





Mental Access #3 Identifying Customer Points of Interest

The second objective under providing value to your customer is to identify points of interest to your customer on business/practice and market issues. From these points of interest, you can initiate and maintain a partnership with your customer.

For each of your top five physicians, research and identify points of interest to your customer on his/her business/practice and market issues. (For example, the customer may be projecting a 25% growth in patient population for his/her practice within the next two years or the Managed Care Organization that governs 50% of the practice has modified the incentive structure, limiting referrals to specialists.)

Your research may involve speaking to the office staff and the physician, as well as to your clustermates and colleagues, about what is important to this customer. These points of interest can then be used to initiate and maintain partnerships with your customer.



Write at least one point of customer interest and a way to build a partnership with that customer on the applicable Access Chart.





Mental Access #3 **Identifying and Implementing Innovative Access Approaches**

The final aspect of providing value to your customers is to work with your clustermates and your extended sales team (e.g., Business Manager, Specialty Representatives and Hospital Representatives) to strategize and implement innovative access approaches tailored to customer needs.



Identify innovative access approaches tailored to customer needs. Identify ways to work with your clustermates and extended sales team to strategize and implement these access approaches. Record your ideas about the innovative access approaches on the applicable Access Chart.





Product Access Identifying and Overcoming Product Access Constraints



The primary focus of this course has been on gaining mental access to your customers. The third and final type of access is Product Access.

Product access is the ability and willingness for a physician to overcome formulary or physician group controls to prescribe a product. In order to do that, you need to understand the access constraint(s) and to make recommendations to the physician about how product access constraints can be overcome.

Use the space below to identify product access constraints. For those products that are not on formulary and can not be put on formulary, provide recommendations to overcome the product access constraints.

Product Name	Access Constraint(s)	Recommendations to Overcome Constraint(s)



ACCESS SUCCESS



Product Access

Identifying and Overcoming Product Access Constraints (continued)

Product Name	Access Constraint(s)	Recommendations to Overcome Constraint(s)



Record any recommendations for overcoming product access on the applicable Access Charts.





Access Success Summary

Throughout this course, you have been adding information to the Access Charts for each physician/customer identified on your "Top Five" list. Utilizing the information from the Access Chart, Access Analysis, Access Success Workbook and Access Profile, complete an Access Action Plan with specific, measurable solutions/action steps you will take to overcome obstacles and utilize resources to gain access to this person.

Given all of the information that you have read and heard, submit to your Business Manager all five completed Access Action Plans—one for each of the following types of access:

1. **Mental Access #1:** Making a positive impression on the customer.
2. **Mental Access #2:** Engaging and encouraging customer involvement in a sales discussion by focusing on relevant professional issues and personal interests.
3. **Mental Access #3:** Providing value to the customer.
4. **Product Access:** Proactively identifying and providing recommendations to overcome product access constraints.

The fifth action plan can be submitted for the type(s) of access of your choice.

Refer to your Access Charts and Access Profiles prior to pre-call planning and determine which action steps you will apply on each visit to the physicians that you identified in this course.

Communicate with your clustermates and counterparts to learn what they have done to gain access to your customers. Incorporate other representatives' successes and lessons learned in your analysis and planning processes.

Using your Weekly Activity Report, keep your Business Manager informed of progress made toward achieving your Access Action Plan goals.

To be successful at gaining access to all of your physicians, you may find it helpful to use this process and complete Access Profiles and Access Charts for other physicians not identified as part of your "Top Five" list.



ACCESS SUCCESS



Access Profile

Example Access Profile

Physician/Customer Name: Dr. Robin Wright-Penn

Physician Type/Specialty: Cardiologist

Focus of Access Profile:

- ☐ Making a positive impression on your customer
- ☐ Engaging and encouraging customer involvement in the sales discussion by focusing on relevant professional issues and personal interests.
- ☒ Providing value to your customer.
- ☐ Identifying and providing recommendations to overcome product access constraints.

What does this physician/customer need from you?

- Information for self/staff on any relevant Merck products
- Information for patients on any relevant Merck products
- Samples of products

What is important to this physician/customer?

- Wants a medicine that works fast and doesn't cause side effects
- Samples
- Patient literature

I will take the following action step(s) to make a positive impression with this customer:

- Help the office staff organize the sample closet
- Schedule lunch meetings on Tuesdays since that is the best day for Dr. Wright-Penn to attend
- Schedule lunch meeting after Passover and Easter holidays

I think this customer's communication style is BOLD.





Access Profile

Based on the information learned from the review of the BEST Communication Styles and listening to "The Mindset of Physicians" audiocassette program, I will communicate differently with this physician by doing the following:

- Get to the point quickly.
- Bring new/old patient literature on relevant Merck products.
- Present relevant information on Merck products.
- Provide samples of relevant Merck products.

To provide value, I am planning to:

- Set up a FMC or Roundtable for the office.
- Provide patient literature.
- Leverage the samples that I provide for patients.

To move the conversation from a non-professional topic of interest to my customer to a professional topic, I can use the following transition:

(Based on Dr. Wright-Penn's personal beliefs about nutrition and exercise, her love for gourmet cooking and the use of the internet by she and her family. . .)

Here's a copy of the genoise cake recipe from Cooking Light that we talked about. The total fat is reduced from 14 grams a serving to 5 grams a serving, without sacrificing taste. REDACTED
REDACTED

What additional steps, if any, will I need to take to gain physical access to this office/physician/customer? What action steps do I need to include on my Access Action Plan to gain physical access to this customer?

Not applicable. I am able to gain physical access to this physician, although:

- The office is usually overbooked with patients – very little time for reps.
- The office will not make appointments for reps.
- The office staff is not friendly to reps.



ACCESS SUCCESS



Access Action Plan Example Access Action Plan

Utilizing the information captured on the profile, complete the following action plan with specific, measurable solutions/action steps you will take to overcome obstacles and utilize resources to gain access to this physician/customer.

Goal: To develop access strategies and apply methods to utilize available resources to gain access to Dr. Robin Wright-Penn by 6/30/2000.

Focus of Access Action Plan:

- ☐ Making a positive impression on your customer
- ☐ Engaging and encouraging customer involvement.
- ☒ Providing value to your customers.
- ☐ Identifying and providing recommendations to overcome product access constraints.

Action Step	Resources Needed	Target Date
Set up a FMC or Roundtable for the office the Tuesday after the Passover and Easter holidays	HEL \$, time in their schedule	4/25/2000
Provide patient literature (take time to explain it to nurse manager)	Patient literature	5/1/2000
Help office manager and nurse manager organize the sample closet	Label maker	5/1/2000
Provide samples (detail the entire office on the product before leaving the samples)	Samples	6/15/2000
Detail the entire office on the product before leaving the samples	Time	6/15/2000

Are your action steps in alignment with:

- What this customer needs from you?
- What is important to this customer?
- Your customer's communication style?
- Available resources that apply to your customer's needs?
- Providing value to your customer?

If not, adjust your action steps accordingly.

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ACCESS SUCCESS

Access Success

Congratulations! Since you are on the last page of the Milestone 1 Access Success non-classroom course, it must mean you've completed all of your work. (Of course, it may mean you are the type of person that goes to the last page first in a book to see how it ends. If this is the case, please know that you will eventually complete this course and it will transform your life.)

The success at having outlined and implemented some action steps for gaining access and providing value to your physicians should help make your job as an Office Based Representative more enjoyable and fulfilling.

If you should have any comments or feedback about this course, please visit FS-Net at <http://fsnet.merck.com/> and click on the FEEDBACK button.

To visit the Sales Training & Professional Development website, sign on to FS-Net, choose the EDUCATION tab from the toolbar on the left and then select Sales Training & Professional Development Department. Happy surfing and happy access!



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